

Long-Term Air Transportation Study Briefing

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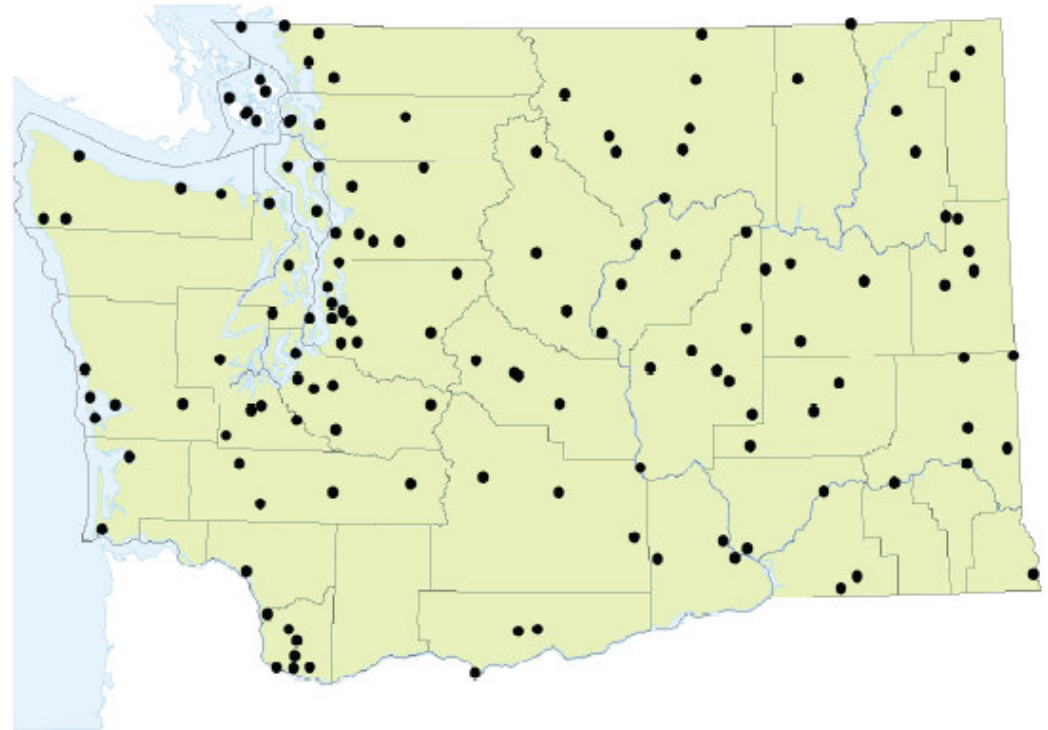


Meeting Objectives

- Overview of LATS Purpose and Statewide Aviation Key Issues
- Provide Council Status Report
- Report on Next Steps and Upcoming Public Outreach

Washington State Aviation System

- 141 public use airports in 2005.
- 66 airports included in National Plan of Integrated Airport Systems (NPIAS).
- Ownership:
 - WSDOT - 17
 - County - 10
 - City/Town - 44
 - Port District - 33
 - Joint - 5
 - Private - 32



What the LATS Legislation Requires

PHASE I	WHAT WE HAVE	<ul style="list-style-type: none">• Assess existing facilities• Develop a baseline• Introduce state classifications	Completed September 2006.
PHASE II	WHAT WE NEED	<ul style="list-style-type: none">• 25-year activity forecast• Commercial market analyses• Air cargo forecast• High speed passenger rail assessment• Future capacity analysis• Summary of system requirements	Completed July 2007.
PHASE III	HOW WE MEET THE NEEDS	Governor appointed planning council to provide recommendations for future airport strategies and statewide investments.	Began in July 2007; to be completed by July 2009.

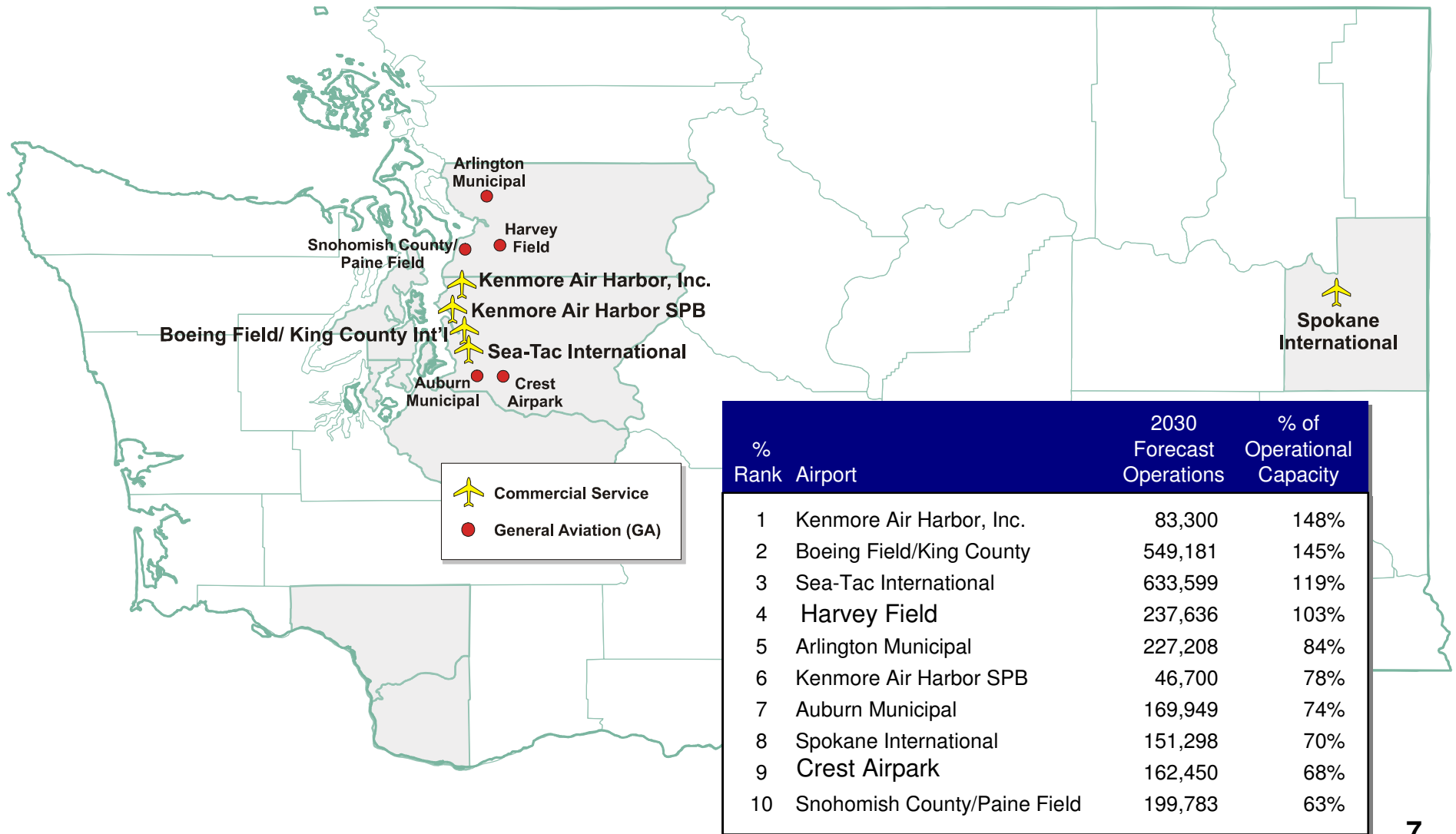
Phase III: Overview of Key Issues and Challenges

- Significant capacity constraints are anticipated by 2030
 - Airfield capacity constraints are expected to emerge at ten airports.
 - Several of these are among the state's busiest airports including Sea-Tac, Boeing Field, and Harvey Field.
 - Approximately one-quarter of Washington's public-use airports are expected to have aircraft storage capacity shortfalls by 2030.
- Passenger rail improvements will not provide meaningful capacity relief to the air transportation system.

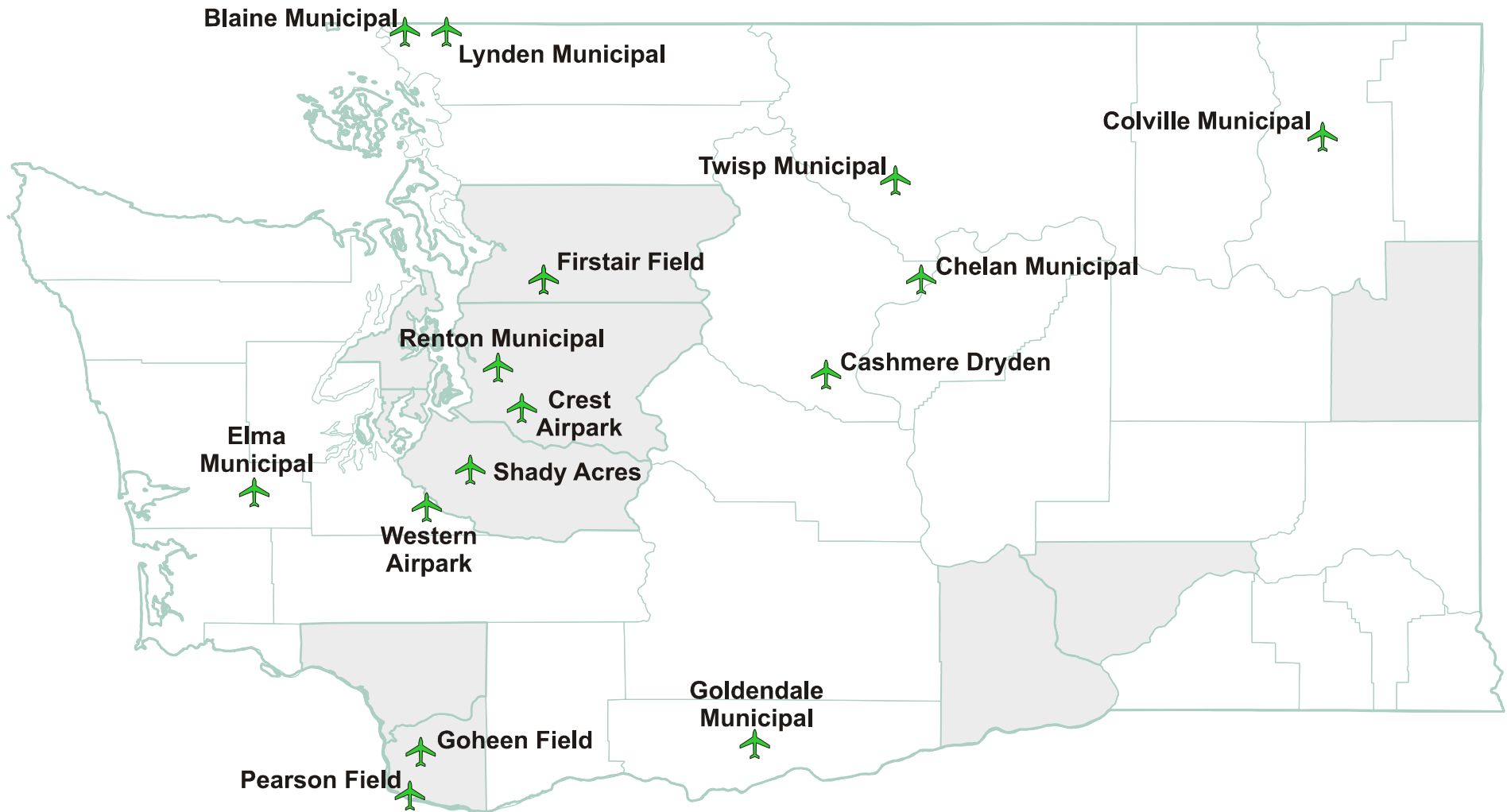
Phase III: Overview of Key Issues and Challenges

- Trends contributing to the loss of service at smaller commercial service airports are expected to continue through 2030.
- The loss of private airfields, which are at higher risk of closure due to land use conflicts or sale for alternative use, could reduce available capacity in high-growth regions.

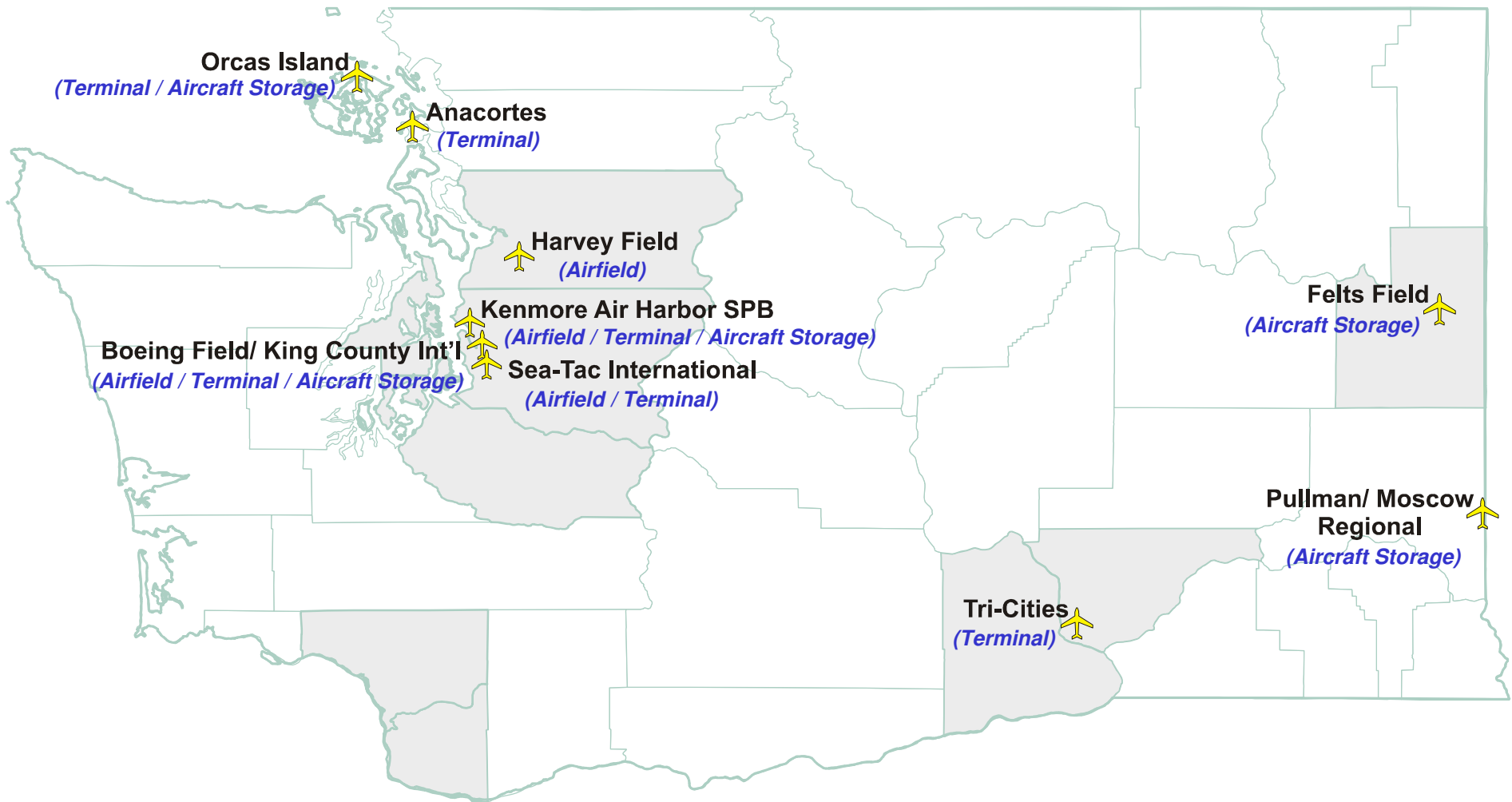
Ten Airports are Forecast to Experience Airfield Capacity Constraints by 2030



Fifteen General Aviation Airports Will Exceed Aircraft Storage Capacity by 2030



Nine Commercial/Regional Service Airports Will Exceed Airfield, Terminal, and/or Aircraft Storage Capacity by 2030



Loss of Air Service in the Last 10-15 Years

Percentage Change in Weekly Scheduled Seats *August 1995 – August 2006*

Airport	Percentage Change
Boeing Field	275%
Roche Harbor	114%
Rosario	114%
Westsound	114%
Sea-Tac	3%
Walla Walla	-11%
Spokane	-20%
Pasco	-23%
Oak Harbor	-25%
Moses Lake *	-35%
Wenatchee	-54%
Friday Harbor	-57%
Yakima	-57%
Pullman/Moscow	-61%
Seattle Lake Union SPB	-68%
Lopez Island	-71%
Kenmore	-80%
Port Angeles	-86%
Olympia	-89%
Center Island	-100%
Decatur Island	-100%
Blakely Island	-100%
Anacortes	-100%
Eastsound	-100%

Note: Moses Lake* lost all scheduled service in October 2006. Source: Official Airline Guide

Many of the smaller commercial service airports in Washington State have lost a considerable amount of air service in the last 10-15 Years.

- With the exception of Sea-Tac, Boeing Field and several San Juan Island airports, all other airports have lost scheduled capacity since 1995.
- 6 airports have lost scheduled service entirely.
- In many cases, competing carriers have exited the market completely, leaving a single carrier which has reduced flight frequency while substituting larger aircraft.
- Proximity to airports with significantly greater service levels results in traffic “leakage”.

Addressing Capacity Constraints

Understanding the Capacity Hierarchy

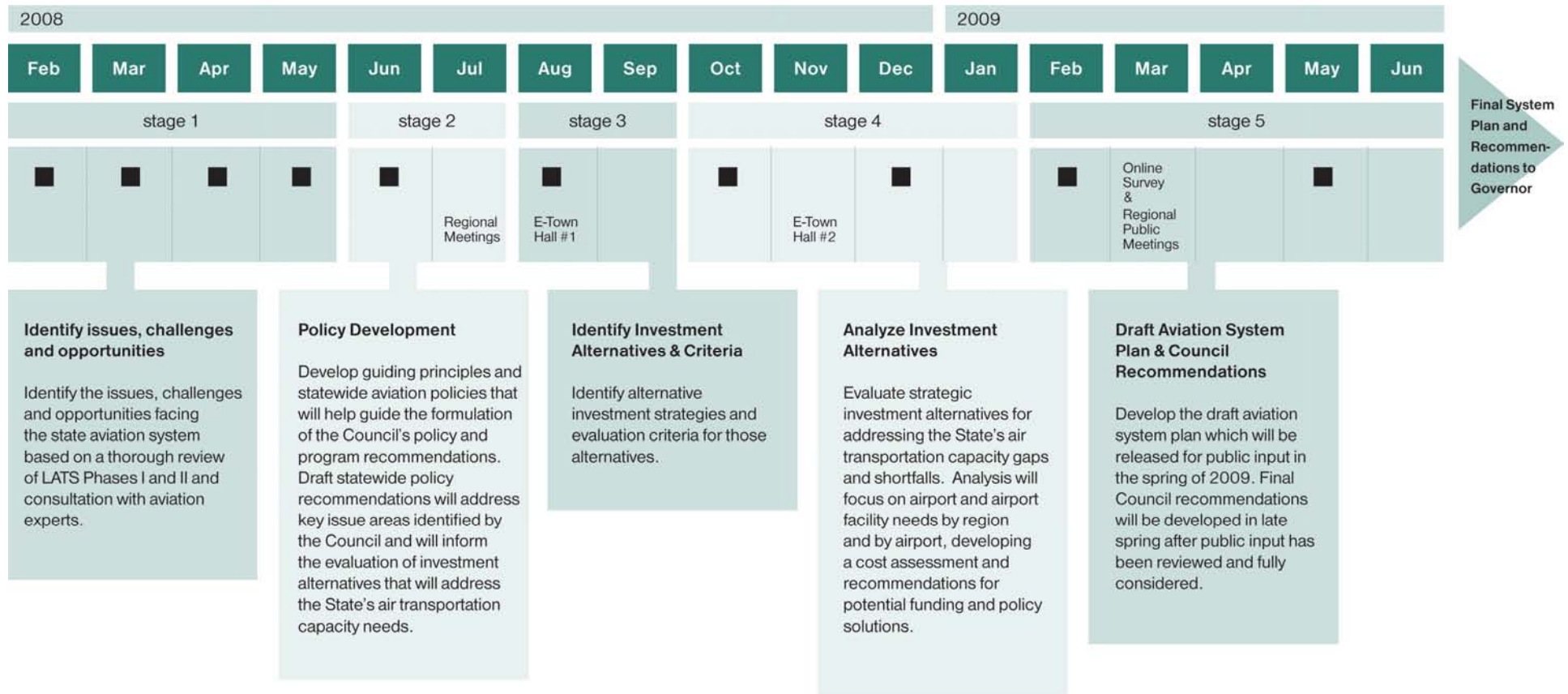
- Airfield Capacity
 - Generally addressed with construction of additional runways, normally parallel with the current primary runway.
 - Critical, difficult to address, time consuming process, public opposition most likely.
- Terminal Capacity
 - Generally addressed with a terminal expansion program.
 - Terminal expansion is generally relatively easy to accomplish.
 - Airports do not build excess terminal capacity – five years hence is the most.
 - SEA is the exception; the port has committed to no expansion beyond 45MAP.
- Aircraft Storage Capacity
 - Generally addressed through hangar construction.
 - Hangars are built on an as-needed basis.
 - Land for hangar expansion is generally, but not always, easier to acquire.

Phase III: Aviation Planning Council Charge

Appointed by Governor Gregoire in 2007, the Aviation Planning Council is charged with using LATS Phases I and II findings, and public input, to determine:

- How best to meet commercial and general aviation capacity needs.
- Which regions of the state are in need of improvement regarding the matching of existing, or projected, airport facilities and the long-range capacity needs at airports within the region expected to reach capacity before 2030.
- Recommendations regarding the placement of future commercial or general aviation facilities to meet the need for improved aviation planning in the region.

What We've Done and Where We're Going



Status Report

- Council has met eight times / all meetings are open to the public.
- Reviewed LATS Phases I and II Data.
- Reviewed statewide system information.
- Developed a list of system wide issues and challenges based on data.
- Developed draft statewide aviation policies.
- Conducted outreach to receive public input on draft policies.
- Reviewing public comments / Council to amend draft policies.
- Establishing criteria to evaluate alternatives.
- Reviewing proposed alternative strategies.


Role of Draft Policies

- Draft statewide aviation policies will address key issues identified by the Council.
- Will inform the evaluation of investment alternatives that will address statewide capacity needs.
- Policies in the areas of capacity, land use, environment, stewardship, economy, mobility and safety.

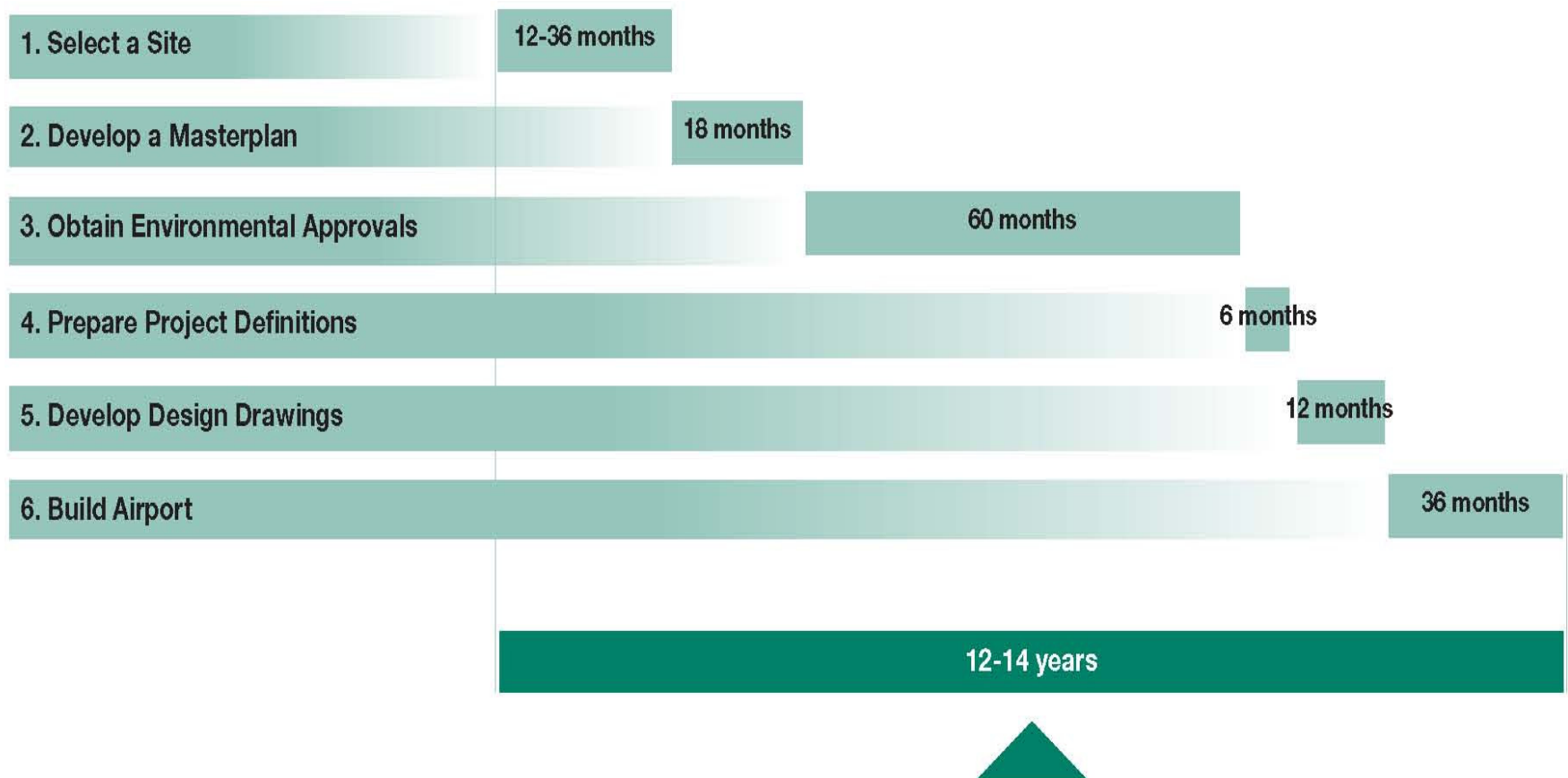
Example Policies

- Washington State shall place a funding and planning priority on maximizing the efficiency and utility of the existing aviation system before creating new airports.
- If WA State's existing system cannot provide sufficient aviation capacity to meet existing and future demand and no sponsor has expressed interest, the state will be given the authority to undertake a site selection process for a new airport.
- WA State should strengthen legislation prohibiting incompatible land uses and promoting appropriate land uses adjacent to public airports.

Hierarchy of Alternative Strategies for Tackling Capacity Constraints/Shortfalls

<i>LEAST INTENSIVE</i>				<i>MOST INTENSIVE</i>
NO ACTION	USE EXISTING FACILITIES	EXPAND FACILITIES	NEW FACILITY	
<ul style="list-style-type: none"> No additional funding for maintenance or technology Investments primarily driven by free market Surrounding airports to absorb excess demand 	<ul style="list-style-type: none"> Demand management at constrained airport(s) Use of new technology at constrained airport(s) Encourage surrounding airports to absorb excess demand 	<ul style="list-style-type: none"> Expansion of constrained airport Expansion of alternate airport Examples could include: <ul style="list-style-type: none"> New or extended runway Passenger terminal Additional aircraft storage 	<ul style="list-style-type: none"> Construct new airport in region 	
	<i>Alternative 1</i>	<i>Alternative 2</i>	<i>Alternative 3</i>	

Timeline - Building a New Airport



Proposed Evaluation Criteria

1. Does the alternative address the issue?
2. Does the alternative meet the goals of the council:
 - a. Capacity enhancement
 - b. Safety
 - c. Environment
 - d. Land Use
 - e. Mobility
 - f. Economy
 - g. Stewardship
3. What are the impacts of the alternative on the region's airspace?
4. What are the impacts of the alternative on the regional surface access system?
5. Can the alternative be implemented based on logistical, political and other decisions made for the airport in their master planning or public participation processes?
6. What is the cost of implementation?

Seattle-Tacoma International Airport

Advantages		Costs	
No-Action			
1. Community needs will continue to be served		1. Increased delay costs (locally and system-wide)	
2. The State is not required to contribute money		2. Increased local impacts (traffic, noise, congestion)	
3. Airport control remains local		3. Negative impact on small community service at WA airports	
4. Private marketplace makes decisions		4. Reduced community travel opportunities	
		5. Increased commercial service at Paine field may negatively impact aircraft manufacturing operations	
Manage Existing System Facilities And/Or Demand			
1. Impacts remain concentrated		1. Capacity shortfall of 100,000 operations by 2030	
2. Implementation costs are minimized by managing access		2. Delay and operating costs will increase	
		3. No increase in capacity or opportunity for increased travel opportunity	
		4. Negative impact on small community service	
		5. Likely result in commercial service at PAI	
		6. Overall negative systemwide impacts	
Expand The Airport			
1. Impacts remain concentrated		1. Addition of a fourth runway replete with negative impacts and high costs	
2. Implementation costs will be minimized		2. Expect community opposition	
Develop New Airport			
1. New/additional air carrier operations capacity created and sized to meet anticipated demand.		1. Significant delay in bringing airport on-line will result in need for continuing improvements at other airports	
2. Capacity will be sufficient through 50 years		2. Redistribution of demand brings key Puget Sound Region airports to full capacity in 2030 including SEA, BFI, and Paine Field.	
		3. If SEA activity relocates to Paine Field for the interim period (15-years), the case for a new airport may not be sustained	
		4. New airport site will attract peripheral growth	

Public Outreach

- Public Comment Period on draft policies in July and November
- Public Open Houses held in July – Mukilteo: July 22, 2008, Wenatchee: July 24
- Electronic Town Hall: August 26, 2008 and November 18 – random sample, interactive survey of several people around the state, conducted by Knowledge Networks.
- Ongoing LATS Briefings upon request.

Next Steps

- Develop order of magnitude costs for alternatives
- Develop narrative for alternatives
- Draft system plan and Council report to Council by January 1st
- Council revisions of the reports in mid-January
- Revised reports drafts to Council in February
- Next Council Meeting
 - Meeting #9: February 5, 2009 (Tri Cities)
- Public Involvement
 - Online survey – March 2009
 - Regional public meetings – March 2009

Questions?

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